

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

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Italy

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Citrus Semi-Annual 2014

Report Categories:

Citrus

Approved By:

Christine Sloop

Prepared By:

Ornella Bettini

Report Highlights:

Italy's MY 2013/14 (November/October) orange production is expected to increase by 4 percent. A shortage of big size (size $\frac{3}{4}$) is expected, as there will be more small size oranges. Fruit quality is expected to be good, despite the unfavorable weather. MY 2013/14 tangerine, lemon, and grapefruit productions are expected to stay flat.

ITALY

Oranges

Table 1: Production, Supply, and Demand (MT)

| Oranges | 2011 | 2012 | 2013 |
|---------------------------|------------------------|------------------------|-----------------------|
| | Estimates 2011/2012 | Estimates 2012/2013 | Forecast 2013/2014 |
| | Post Data | Post Data | Post Data |
| Area Planted | 101,498 | 83,514 | 83,397 |
| Area Harvested | 99,569 | 81,270 | 82,088 |
| Production | 2,020,000 | 1,730,000 | 1,800,000 |
| Imports | 178,151 | 223,566 | 200,800 |
| Total Supply | 2,198,151 | 1,953,566 | 2,000,800 |
| Exports | 114,298 | 126,083 | 128,000 |
| Fresh Dom. Consumption | 1,793,853 | 1,518,483 | 1,507,800 |
| For Processing | 290,000 | 309,000 | 365,000 |
| Total Distribution | 2,198,151 | 1,953,566 | 2,000,800 |

Sources: Italian industry; ISTAT (Italian Institute of Statistics); GTA (Global Trade Atlas)

PRODUCTION

Italy's MY 2013/14 (November/October) orange production is expected to increase by 4 percent. A shortage of big size (size $\frac{3}{4}$) is expected, as there will be more small size oranges. Fruit quality is expected to be good, despite the unfavorable weather. Sicily and Calabria are the main orange-producing areas, accounting for 59 and 22 percent respectively. *Tarocco*, *Moro*, *Sanguinello*, *Naveline*, and *Valencia* are the chief varieties grown in Italy.

CONSUMPTION

Italy's MY 2013/14 orange consumption is expected to stay flat at lower levels than MY 2011/12 as economic challenges affected consumer choice and purchase ability. Most oranges are consumed fresh. Blood varieties (*Tarocco*, *Moro*, and *Sanguinello*) are used mainly for fresh consumption. Late varieties (*Ovale* and *Valencia*) are destined to both fresh market and processing industry.

TRADE

In MY 2012/13, Italy exported 126,083 MT of oranges, mainly to Germany (39,384 MT), Switzerland (20,120 MT), and Austria (14,347 MT). Italy's MY 2012/13 orange imports reached 223,566 MT, mainly from Spain (144,038 MT) and South Africa (34,347 MT).

Orange Juice

Table 2: Production, Supply, and Demand (MT)

| Orange Juice | 2011 | 2012 | 2013 |
|---------------------------|------------------------|------------------------|-----------------------|
| | Estimates 2011/2012 | Estimates 2012/2013 | Forecast 2013/2014 |
| | Post Data | Post Data | Post Data |
| Delivered to Processors | 290,000 | 309,000 | 365,000 |
| Production | 20,300 | 21,630 | 25,550 |
| Imports | 15,783 | 15,345 | 13,800 |
| Total Supply | 36,083 | 36,975 | 39,350 |
| Exports | 35,633 | 36,475 | 38,530 |
| Dom. Consumption | 450 | 500 | 820 |
| Total Distribution | 36,083 | 36,975 | 39,350 |

Sources: Italian industry; GTA

According to latest estimates, Italy is forecast to process about 365,000 MT of oranges in MY 2013/14 to produce 25,550 MT of concentrate. The total volume of oranges channeled to processing depends on crop quality and quantity of oranges destined for the fresh market, both domestic and foreign.

Tangerines

Table 3: Production, Supply, and Demand (MT)

| Tangerines | 2011 | 2012 | 2013 |
|---------------------------|------------------------|------------------------|-----------------------|
| | Estimates 2011/2012 | Estimates 2012/2013 | Forecast 2013/2014 |
| | Post Data | Post Data | Post Data |
| Area Planted | 38,338 | 35,515 | 36,327 |
| Area Harvested | 37,102 | 34,546 | 35,306 |
| Production | 739,000 | 792,000 | 789,000 |
| Imports | 95,381 | 90,811 | 91,000 |
| Total Supply | 834,381 | 882,811 | 880,000 |
| Exports | 116,831 | 89,421 | 88,900 |
| Fresh Dom. Consumption | 673,550 | 740,390 | 711,100 |
| For Processing | 44,000 | 53,000 | 80,000 |
| Total Distribution | 834,381 | 882,811 | 880,000 |

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2013/14 tangerine production is expected to stay flat. Italy's tangerine production consists of over 80 percent seedless clementines and nearly 20 percent mandarins. Italy's MY 2013/14 clementine production is expected to remain stable (668,000 MT compared to 670,000 MT in 2012/13), so as mandarin production (121,000 MT compared to 122,000 MT in 2012/13). Quality is expected to be satisfactory for both clementines and mandarins. Calabria, Sicily, and Apulia are the main tangerine-producing areas, accounting for 50, 23, and 14 percent respectively. *Comune* or *Oroval* and *Monreal* are the leading clementine varieties grown in Italy. *Avana* and *Tardivo di Ciaculli* are the main mandarin varieties.

CONSUMPTION

Most tangerines are consumed fresh. Italy's MY 2013/14 tangerine fresh consumption is expected to slightly decrease by 3.9 percent compared the previous season as a lot of product is expected to be destined to the processing industry. Italians consume large quantities of clementines and mandarins during winter holidays when the bulk of production hits the market.

TRADE

In MY 2012/13, Italy exported 89,421 MT of tangerines, mainly to Poland (18,602 MT), Romania (10,338 MT), Lithuania (7,813 MT), and Hungary (7,643 MT). Italy's MY 2012/13 tangerine imports reached 90,811 MT. Spain is the leading supplier to the Italian tangerine market, representing 87 percent (79,119 MT) of total imports.

Lemons

Table 4: Production, Supply, and Demand (MT)

| Lemons | 2011 | 2012 | 2013 |
|---------------------------|--------------------------------|--------------------------------|-------------------------------|
| | Estimates 2011/2012 | Estimates 2012/2013 | Forecast 2013/2014 |
| | Post Data | Post Data | Post Data |
| Area Planted | 28,628 | 25,703 | 24,946 |
| Area Harvested | 24,348 | 21,023 | 21,659 |
| Production | 458,000 | 411,000 | 412,000 |
| Imports | 110,753 | 97,451 | 97,000 |
| Total Supply | 568,753 | 508,451 | 509,000 |
| Exports | 38,313 | 39,452 | 39,800 |
| Fresh Dom. Consumption | 445,440 | 403,239 | 379,200 |
| For Processing | 85,000 | 65,760 | 90,000 |
| Total Distribution | 568,753 | 508,451 | 509,000 |

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2013/14 (November/October) lemon production is expected to stay flat. Sizes are regular. Sicily produces more than 86 percent of Italy's lemons. Lemon-producing area is progressively decreasing: higher input costs and lower prices have negatively affected crop profitability. *Femminello Commune* (F. Zagara Bianca, F.Siracusano, F. S.Teresa), *Monachello*, and *Interdonato* are the main lemon varieties grown in Italy.

CONSUMPTION

Italy's lemon production is mostly destined for the fresh market. Italy's MY 2013/14 Italian lemon consumption is expected to decrease by 5.9 percent compared to the previous season as a lot of product is expected to be destined to the processing industry.

TRADE

In MY 2012/13, Italy exported 39,452 MT of lemons, mainly to Germany (13,166 MT) and Austria (4,853 MT). Italy's MY 2012/13 lemon imports reached 97,451 MT, mostly from Spain (40,467 MT) and Argentina (38,550 MT).

Grapefruits

Table 5: Production, Supply and Demand (MT)

| Grapefruits | 2011 | 2012 | 2013 |
|---------------------------|--------------------------------|--------------------------------|-------------------------------|
| | Estimates 2011/2012 | Estimates 2012/2013 | Forecast 2013/2014 |
| | Post Data | Post Data | Post Data |
| Area Planted | 303 | 312 | 312 |
| Area Harvested | 253 | 262 | 263 |
| Production | 7,100 | 7,500 | 7,500 |
| Imports | 28,050 | 28,604 | 28,600 |
| Total Supply | 35,150 | 36,104 | 36,100 |
| Exports | 1,935 | 2,583 | 2,588 |
| Fresh Dom. Consumption | 33,215 | 33,521 | 33,512 |
| For Processing | 0 | 0 | 0 |
| Total Distribution | 35,150 | 36,104 | 36,100 |

Sources: Italian industry; ISTAT; GTA

PRODUCTION

Italy's MY 2013/14 (November/October) grapefruit production is expected to stay flat.

CONSUMPTION

Italy's MY 2013/14 grapefruit consumption is expected to remain stable.

TRADE

In MY 2012/13, Italy exported 2,583 MT of grapefruits, mainly to Slovenia (627 MT), the Netherlands (355 MT), and France (331 MT). Italy's MY 2012/13 grapefruit imports reached 28,604 MT, mainly from South Africa (11,582 MT), Israel (4,924 MT), and Cyprus (3,513 MT).

Abbreviations and definitions used in this report

MY Marketing year

Oranges, Tangerines, Lemons, Grapefruit, Orange Juice: November/October

HS Codes

Oranges: 080510

Tangerines: 080520

Lemons: 080550

Grapefruit: 080540

Orange juice: 200911; 200912; 200919

MT Metric ton = 1000 kg

Ha hectare; 1 ha = 2.471 acres

EU European Union